

Session 2: Module 1 - Search-Part 1	
SCRIPT	
Description	Text
Introduction	Welcome to M-SPIRIT Session #2: Participant Search and List , of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
Duration	This session should take about 60 minutes to complete all of its modules.
Overview_1	Session #2 is an in-depth look at all of the pertinent functionality available on the Participant List and Prescreen panels.
Objectives_1	After reviewing all of the modules in this session, you will be able to:
	Use menu options to perform certain functions;
	Recognize icons on the Participant List screens;
	Search different participant lists such as On-site, Local, Statewide and Appointments for Today using different criteria;
	Understand how to use the Show Details button to display more participant information;
	Prescreen applicants by creating new households or creating new members for existing households;
	Perform out-of-state and in-state transfers using the Prescreen and Participant List screens respectively.
Start	Participant Search and List – Part 1
<search>	When the M-SPIRIT clinic application first opens, it opens to the blank Participant List screen.
	Since M-SPIRIT is a centralized database containing all Montana WIC participant records, you must first search for a participant in order to view a participant list.
<where>	There are 4 different databases you can perform a participant search in: On-Site, Local, Statewide and Appointments for Today.
	The default search database is local.
	Your Local database is the CLINIC you selected to work at when you opened M-SPIRIT; not your Local Agency.
	You can select to search another database by clicking the radio button in front of that option.
	The State WIC ID is automatically enabled for each type of search.

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StateWICID	The participant's State WIC ID is automatically assigned by the system during the prescreen process.
	This ID is a completely unique 8-digit ID number assigned to each participant in the Montana WIC database; no two participants in Montana will ever have the same State WIC ID.
	This ID never changes; it always stays the same and follows the participant throughout their participation on Montana WIC.
	Each member of a household has their own State WIC ID.
<statewic>	When searching by State WIC ID, the system will auto-fill preceding zeros for you.
<statewic1>	We are going to search for a participant in our Local database by State WIC ID.
	Type the State WIC ID 750005 into the field and then press the Enter key on your keyboard or click the Search button.
<statewic2>	You have just performed your first participant search in M-SPIRIT...
	Notice the system auto-filled the preceding zeros.
	The State WIC ID is the fastest and most efficient way to search for a participant because only one record can possibly match it.
System Msg	If the system cannot find a participant to match the criteria you've entered, you will receive the following message indicating that "No participant matching your search criteria could be found."
<statewic3>	When you search in the Local database, the information provided in the participant list includes: State WIC ID, Household ID, Last Name, First Name, Middle Initial, Date of Birth and WIC Category.
WIC Category	The WIC Categories (sometimes also called WIC Status in M-SPIRIT) are Infant, Child, Breastfeeding, Non-Breastfeeding and Pregnant.
Search	The search function is always enabled on the Participant List screen.
	When performing a search you have two options: click the Search button or press the Enter key on your keyboard.
Tip	Here's a tip...using the Enter key on your keyboard is the fastest way to complete your search!

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HouseholdID	The Household ID is the same 8-digit number assigned to all members within a specific household.
	It functions to link the participant records of family members or participants that share the same household.
	A household ID is assigned as soon as a participant is either added to an existing household or a new participant is added to the Montana WIC database.
HouseholdID1	The Household ID can change. If a participant is switched from one household to another, the participant's Household ID will change to match the household they should be considered part of (such as may occur with children in foster care).
<hhid_1>	The system will also auto-fill any preceding zeros for the Household ID.
	In order to search for participants by their Household ID, you must click the Household ID radio button to enable the field.
	Go ahead and click it.
<hhid_2>	Type Household ID 75395 into the field and then press the Enter key on your keyboard or click the Search button.
<hhid_3>	The Household ID is the second fastest way to search since, again, the potential results are limited to a small number.
	Let's refresh the participant list by clicking the Clear button.
<clear>	The Clear button "refreshes" the screen by removing all search results and criteria and setting the search back to its default settings.
	You can also search for participants using their Demographic information.
	Like the other search criteria, you have to click on the radio button to enable the fields in that section.
	Click the Demographics radio button.
<demo1>	This enables the Last Name, First Name, Middle Initial and Date of Birth fields.

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Demo	You can search for participants using their last name and/or first name.
	You can type letters, spaces, single quotation marks, periods, commas and hyphens into the name fields. You cannot, however, type any numbers.
	The more characters you type into the name fields, the greater the filter criteria and the faster the search.
<demo2>	We are going to search for a participant by the last name of Sunshine.
	Type sunshine into the Last Name field and press the Enter key or click the Search button.
<demo3>	Like most text fields in M-SPIRIT, the system automatically converts our typed text to capital letters for consistency throughout the database.
<demo4>	Were you expecting exact matches to "SUNSHINE"?
	Did you notice that other names such as SAMSON and SWANSON are also part of the search results?
Demo1	M-SPIRIT uses a function called "Soundex" to filter name-based searches.
	Soundex performs a phonetic search, meaning the results will include numerous possible matches based on whether they sound like the name or names used in the search criteria.
<sort>	You can sort the records in your participant list by clicking on the column header.
	.Notice that currently the IDs are in descending order....Click on the State WIC ID column header
<sort1>	...and now they are in ascending order.
	Click the Household ID column header.
<sort2>	Now click the Last Name column header...
<sort 3>	...and the records are listed alphabetically.
	Might as well keep going. Click the First Name column header.
<sort4>	Click the Date of Birth column header.
<sort5>	OK. Last one. Click the WIC Category column header.

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<sort6>	You can change the sort order from ascending to descending or vice-versa by clicking the column header a second time.
	Click WIC Category again.
<sort7>	Let's refresh the screen before continuing. Do you remember how to do that?
<demo5>	The Clear button "refreshes" the screen by removing all search results and criteria and setting the search back to its default settings.
	Let's go back to talking about the Demographics search criteria section.
	Click on the Demographics radio button.
<dob>	You can also search by Date of Birth.
DOB	This field works the same as all other date fields in M-SPIRIT.
	The system requires you to type either forward slashes, hyphens or periods between the month, day and year. Otherwise, it will not recognize the text in the date field and will automatically clear the text in the field once you have clicked the Search button.
<dob1>	Similar to most other date fields, M-SPIRIT will auto-fill preceding zeros and the first two digits of the year.
	For example, go ahead and type: 2/2/10 into the Date of Birth field then press your Enter key or click the Search button.
<dob2>	Notice that the system auto-filled the preceding zeros and the first two digits of the year.
Date	All date fields in M-SPIRIT have a calendar drop-down available as a short cut. It is especially useful for participants who have recent birth dates.
	If the date field is blank, the calendar will default to the current month and year, otherwise the calendar will default to the month and year that appears in the date field.
<calendar>	Click the Date of Birth drop-down arrow to open the calendar.
<calendar1>	Today's date is September 14, 2010. The date is highlighted by a dotted line.
	Click the left arrow at the top of the calendar to move the month backwards by one month.
<calendar2>	The calendar is now August 2010.
	Click the left arrow again...

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<calendar3>	...and the month is now July 2010.
	Now click the arrow on the right.
<calendar4>	And you move the calendar forward one month.
	Click the right arrow again...
<calendar5>	...and we are right back where we started.
	Click the Today button to automatically select the current date for the field.
<calendar6>	When using Demographics as search criteria, the more defined your search is, the faster it will occur.
	Which means searching by last name, first name and date of birth is going to be a more efficient search than searching just by last name.
<agency>	OK. So, have you noticed that the Agency field is part of the Demographics search criteria but not enabled when searching the Local database?
<agency1>	The Agency drop-down list is enabled only when you select Statewide from the Where to Search section
	Click the statewide radio button.
<agency3>	The Agency drop-down list is now enabled and can be used to help filter your search even further.
	Click the Agency drop-down arrow to open the list.
<agency4>	All of the Montana WIC agencies are listed here along with their agency IDs.
<agency5>	<no script>
<agency6>	Click on RIVERSTONE to select.
<agency7>	<no script>
<agency8>	We are logged into the RIVERSTONE WIC Clinic (which is a clinic within the RIVERSTONE agency). Remember, our Local database only includes the participants in the RIVERSTONE WIC clinic, not the entire agency.
	Searching the entire RIVERSTONE agency will search all of the clinics in the agency, not just the clinic we are logged into.
	The Agency drop-down can help the search be more efficient by filtering the records so that only those in RIVERSTONE Agency are searched.
	Let's search for another participant.

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<agency9>	Press the Enter key or click the Search button.
<agency10>	<no script>
<agency11>	There are more columns displayed in the Statewide view.
<agency12>	<no script>
<agency13>	The additional columns include: Gender, Agency Number and Clinic Number.
	The title bar at the top of the Participant List screen always displays which database records are being displayed.
Agency	You do not have to select an agency when searching statewide. Like Local, you must enter some kind of search criteria because the size of the database is very large.
	When searching Statewide, the system searches all participant records in the Montana WIC database.
Agency1	The more search criteria you enter, the faster and more efficient your search. Again, the fastest search method is always going to be the State WIC ID since there is only one matching record.
On-site/Appts	On-site and Appointments for Today are smaller subsets of your clinic database created by staff.
	They provide faster search results because the number of participants listed in them is much smaller. You are not required to enter any other criteria to search either of these databases.
<appts>	Click on the Appointments for Today radio button.
<appts1>	Remember, since the Appointments for Today is a small subset of your clinic database, you can simply press the Enter key on your keyboard or click the Search button; no other criteria has to be entered. Go ahead and do that.
<appts2>	The Appointments for Today database is created when participants are scheduled for appointments at your local agency using the M-SPIRIT Appointment Scheduling.
	The list includes any participants scheduled for an appointment at your clinic on the current date.
NOTE!	It should be noted that participants who are transferred out of your clinic will continue to show on the Appointments for Today list and all other appointment screens.

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<appts3>	The Appointments for Today participant list displays the following columns in the left end of the grid: Appointment Time, Appointment Type, Kept checkbox, State WIC ID, Household ID, and Last Name.
<kept>	The Kept column contains a checkbox.
	You can indicate that a participant came to their appointment at any time during the day in two different ways.
	However, regardless of how you choose to do so, you can only mark one participant as having kept their appointment at a time.
	First, you need to select the participant you want to mark as having kept their appointment.
	Click on RAINDROP, SADI (State WIC ID = 00578850) at 3:00 to highlight.
<kept1>	One method is to use a menu option. Click the Participant List menu.
<kept2>	Select Mark Appointment as Kept.
<kept3>	<no script>
<kept4>	The checkmark is inserted into the Kept checkbox.
	The second method, which we will review in a moment, has a confirmation message informing you that the Kept column in the Appointments tab of the participant folder has also been updated with a checkmark.
	With this method, there is no such indicator.
<kept5>	But, you can rest assured that the folder has also been updated.
<appts4>	Just FYI - we are looking at a different day's appointments now.
	Since the 8:00 appointment is already highlighted, let's mark it as having been kept using the second method.
	...which is to simply click the checkbox in the Kept column. Go ahead and do that.
<appts5>	You can do this at any time during the day.
	Notice when you clicked the checkbox an Update Kept button appeared above the column.
	The Update Kept button must be clicked to save any changes made to the checkbox.

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	If a new search is performed before you click the Update Kept button, any changes made to the checkbox will not be saved.
	Let's also indicate the 8:30 appointment is here before clicking the Update Kept button. Go ahead and click the checkbox for the 8:30 appointment also.
<appts6>	Click the Update Kept button to save our checkmarks for the 8:00 and 8:30 appointments.
<appts7>	A confirmation message displays that reads: "The appointment attendance has been updated."
	This message indicates that the Kept column in the Appointment Tab of the participant's record, or Participant Folder, has also been updated with a checkmark.
<apptspf>	The Appointments tab will be reviewed in detail in Session 8.
<apptsOK>	Press your Enter key or click the OK button on the message to clear it.
<appts8>	Notice that the Update Kept button no longer displays.
	You can remove a checkmark simply by clicking on the checkbox again.
	Let's remove the checkmark from the 8:30 appointment. Click on its checkbox.
<appts9>	Since a change was made to the Kept column, the Update Kept button reappears.
	Click the Update Kept button to save the change.
<appts10>	Once again, the appointment information in the participant's record is updated by the system.
<appts11>	Notice, now only one checkmark.
<appts12>	Press your Enter key on your keyboard or click OK on the message.
<appts13>	We are going to scroll to the right since There are more columns to this grid...
<appts14>	<no script>
<appts15>	Resources are defined by each local agency in the build clinic calendar and represent staff designations.
Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions form on the Montana WIC website.

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